REP200U - Reporting with Business Warehouse and Business Objects

Class Script

REP200U Introduction

Welcome to REP200U Reporting with BEx and Business Objects.

REP200U Index

This online class discusses two tools used to access SCEIS reports, BEx and Business Objects. The first section of this class is BEx with five lessons. The second section focuses on Business Objects and also has five lessons. Click the title of the section you would like to view.

Course 1 - BEx

BEx Index

The lessons within the REP200U BEx section include:

- Lesson 1: BEx Overview
- Lesson 2: Logging into BEx
- Lesson 3: Generating a BEx Report
- Lesson 4: Manipulating Report Data
- Lesson 5: Managing Workbooks

Lesson 1 - BEx Overview

Lesson 1: BEx Overview

Lesson 1 - SCEIS Reporting

Let's begin by discussing SCEIS Reporting. Agencies use SCEIS reports to view and analyze SCEIS data to help make sound business decisions. SCEIS reports can be found in the Enterprise Core Component (ECC) portion of SCEIS, BEx and Business Objects. The BEx portion of this class will teach users how to access and run reports in BEx.

Lesson 1 - BEx Overview

Much of the data in SCEIS is entered or housed in the Enterprise Core Component, or ECC. Many of the reports in ECC contain up-to-the-minute data, but are not easy to manipulate.

Nightly, data from SCEIS is retrieved and placed into the SCEIS Business Warehouse, which creates and updates BEx and Business Objects reports. Data in BEx reports, or queries, is current as of the close of business of the previous day. For example, when viewing a BEx report on Tuesday, the report contains data that has been entered through the close of business on Monday.

Reports in BEx are easier to manipulate than ECC reports and users have more filtering and formatting options in BEx. Business Objects is discussed in the Business Objects portion of this class.

A list of available BEx queries can be found on the SCEIS uPerform site.

Lesson 2 - Logging into BEx

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Lesson 2 - Logging into BEx

To log into BEx, type the SCEIS web address, www.sceis.sc.gov in your web browser. Next, click the SCEIS Logins button.

Click the Citrix link.

Enter your SCEIS user name and password, then click Log On.

Click the BEx Analyzer seven point three icon.

You are now logged into BEx.

Lesson 3 - Generating a BEx Report

Lesson 3: Generating a BEx Report

Lesson 3 - Opening a Query

To open a BEx query, begin by clicking the Add-Ins tab.

Click the Open icon and…

…select Open Query.

Select the PROD – BW Production System and click OK. Note: If you have checked the “Use Selected System as Default” option, this screen will not appear and you will be taken directly to your default system.

The first time you access BEx, you will need to enter the following information:

In the Client field, enter 010.

Next, enter your User ID in the User field.

The password is automatically populated.

The Language should default to English, EN. Click OK when you have entered this information.

Your information will be saved for subsequent logins.

Lesson 3 - Searching for and Selecting a Query

From the Open window, click Roles.

Double-click on the appropriate folder to expand it.

Now, select the desired query, and then click Open.

Lesson 3 - Selecting Values in the Prompt Screen

Many of the BEx queries require you to select values for certain filters. Filters narrow down the information that is retrieved from the database. After opening a query, a prompt screen will appear. You are required to select a value for any filter that has an asterisk beside the filter.

In this example, we have opened the FM Budget versus Actual report. The prompt screen appears. The first filter is Fiscal Year. To select a fiscal year, click the Select from List icon. Note, you can also type the fiscal year desired in the text field.

In this example, we are going to select the fiscal year from a list of values.

From the Select Values pop-up window, click the Show drop-down menu, and select Single Values.

Select the fiscal year you would like to see and click OK.

The next filter in the example is Posting Period.   Click the Select from List icon.

Click the Show drop-down menu, and select Single Values.

Select the value you would like to filter by and click OK.

The next filter in the example is Business Area.   Click the Select from List icon and choose the value you wish to filter by.

Selecting a Range of Values in the Prompt Screen

You can also enter a range of values for a filter in the prompt screen. Begin by clicking the Select from List icon for the data field you would like to filter by. In this example, we will filter by Fund.

Click More.

In the Show drop-down menu, select Value Ranges.

Choose the operator you would like to use.

Next, click the Select from List icon beside the first blank drop-down box.

In the Show drop-down box, choose Single Values.

Select the beginning value in your range of values. You may also type the value in the Direct Input field. Note: To see the key and text information for the values, click the Display Key/Text icon.

Now, click OK.

Click the Select from List icon beside the second blank drop-down box.

In the Show drop-down box, select Single Values.

Select the ending value in your range of values or type the value in the Direct Input field. Next, click OK.

Then click the arrow pointing to the right to move the values into the Chosen Selections box.

The green brackets indicate that this range of values will be included in the report. To exclude this range of values from the report, click the Exclude from Selection icon. In this example, we would like to include the range of values in the report.

Next, click OK.

Alternatively, if you would like to type the range of values in the prompt screen be sure to use the format shown.

You would enter VALUE ONE space hyphen space VALUE TWO. If filtering by multiple ranges, use a semicolon to separate the ranges.

Continue to select values for the remaining filters. Remember, required filters will have an asterisk beside the filter name. The other filters are optional.

Click OK when you have selected values for all desired filters.

Data based on your filter selections will populate in the report workbook.

Lesson 3 - Report Components

Let's discuss the components of the report workbook. The report workbook screen is very similar to an Excel spreadsheet. The report title can be found at the top of the workbook. The report results are located in the Table. The Worksheet Tabs are located at the bottom of the screen. The available data fields, or Free Characteristics, in the query are found in the Filter section of the workbook. (Initially, this section may be hidden. Click the Filter button to view the available data fields in the query.)

Lesson 3 - Refreshing a Report

To refresh a report and select different filter values, click the Change Variable Values icon.

The prompt screen appears. Change the filter values as desired and click OK.

Data based on your new filter selections will populate in the report workbook.

Lesson 4 - Manipulating Report Data

Lesson 4: Manipulating Report Data

Lesson 4 - Adding Columns

In many BEx queries, there are additional data fields you can add to the report that are not seen in the default view. To add a column, right-click within any cell and select Query Properties.

The Query Properties window appears. Select the Navigational State tab. The data fields in the Free Characteristics box are available to add to the report. Select the data field you would like to add, and use the left arrow to move it into the Rows box.

You can use the up and down arrows in the Rows box to reorder the columns.

Once you have added the data fields to the Rows box, click OK.

Lesson 4 - Moving Columns

You can also move a column to a different location in the report. To move a column, right-click within any cell and select Query Properties.

The Query Properties window will appear. Click the column you wish to move and use the up or down arrows in the Rows box to reorder the data fields.

In this example, we have moved Funds Center after Fund. Next, click OK.

Notice the Funds Center column is now after the Fund column.

Lesson 4 - Removing Columns

To remove a column from the report, right-click on any cell and select Query Properties.

The Query Properties window will appear. Select the data field to remove, and use the right arrow to move it into the Free Characteristics box. In this example, we are removing Funds Center from the report.

Next, click OK.

Notice the Funds Center column is no longer in the report.

Lesson 4 - Suppressing Repeated Values

In some columns, you will notice a value is repeated several times. To suppress repeated values in all columns, right-click in a column and select Query Properties. Note: The values in most queries are suppressed by default.

Click the Display Options tab, then check the Suppress Repeated Key Values box.

Notice that the values in the query are only listed once.

Lesson 4 - Suppressing and Displaying Results (Subtotal) Rows

In some queries, you will notice yellow Result rows. Result rows provide subtotals of the columns to the right of the column desired. If you would like to remove or suppress result rows, right-click within a cell where the results begin and choose Properties.

Click the General tab. In the Results Rows drop-down box, select Always Suppress. Next, click OK.

The results rows will no longer appear in the report.

To add results rows (or subtotals) to a particular column, right-click in the column to the right of the column you want to subtotal. For example, to add a subtotal for each Fund, right-click in the Commitment Items column and select Properties.

Click the General tab. In the Results Rows drop-down box, select Always Display.

Next, click OK.

You should now see subtotals for each Fund.

To get an overall subtotal, right-click in the first column of the report and choose Properties.

Click the General tab. In the Results Rows drop-down box, select Always Display.

Next, click OK.

Lesson 4 - Displaying Key and Text

Some values, such as Commitment Items, have corresponding text information that describe the Commitment Items numeric value, or key. To display the key and text of a field, right-click within a cell in the desired column, and select Properties.

Click the General tab. Under the Display drop-down menu, select Key and Text. Next, click OK.

A new column is added with the text that describes the Commitment Items key values.

Lesson 4 - Expanding Columns

Some data fields are calculated key figures, or measures. Some report measures are created from a calculation of other measures. These are denoted by an arrow pointing to the right in the top left corner of the column header. Clicking this arrow will display the measures used to calculate the data field. In this example, we will expand the Commitments and Other Transactions column.

Notice that additional columns appear after expanding the Commitments and Other Transactions column. The values in these columns are used to calculate the Commitments and Other Transactions.

Lesson 4 - Setting a Filter

You can apply a filter to the BEx report to display only the data you wish to see. Begin by clicking the Filter button to display the Filter section. The filter section options will display to the left of the worksheet.

Next, right-click on the desired field in the Filter section, and choose Select Filter Value.

In the Show drop-down menu, select Single Values.

Select the value you wish to filter by, and click OK.

The filtered value will appear in the Filter section of the report as shown here.

Lesson 4 - Removing a Filter

To remove a filter, right-click on the filter and select Remove Filter.

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Lesson 5 - Managing Workbooks

Lesson 5: Managing Workbooks

Lesson 5 - Saving as a New Workbook

You can save any changes you made to a report in your BEx Favorites folder so you are able to access your format each time you log in to BEx. To save a report, or workbook, click the Save icon.

Next, select Save Workbook.

Select the Favorites folder, then title your report in the Description field. Next, click Save.

Lesson 5 - Inserting a Second Query into a Workbook

Sometimes it may be beneficial to have data from two queries in the same document or workbook. You can add a second query in another tab of the report to compare data easily.

In an open workbook, click Insert Worksheet in the bottom left corner of the spreadsheet.

On the new worksheet, click the BEx Analyzer drop-down menu and select Design Toolbar. Next, choose Insert Analysis Grid.

Click the cell that contains the design image.

In the Properties of Analysis Grid window, click the Create Data Provider icon.

Next, click the Assign Query/Query View icon in the Create Data Provider window.

Choose the desired query and click Open.

Click OK within the Create Data Provider window.

Click OK at the Properties of Analysis Grid window.

Click the BEx Analyzer drop-down menu, then select the Design Toolbar. Next, choose Exit Design Mode.

You will see the second query appear on the worksheet. Save the workbook if desired.

Lesson 5 - Emailing a Workbook

You can email a BEx report or workbook to other BEx users. First, you must Save the workbook to a place on your computer. Begin by clicking the File menu, then selecting Save As.

Choose a location on your computer to save the report. Please note that the Desktop location under Favorites is your Citrix Virtual Desktop. This is not your computer’s Desktop.

To make sure you are selecting a location on your computer or network drive, expand the Computer menu to view a list of available drives.

Change the File name if desired, then click Save.

In an open email, locate the BEx report on your computer and attach it to the email.

Workbook - Recipient

The email recipient should save the attached BEx report to a place on their computer.

To open the BEx report, the email recipient must be logged into BEx.

In BEx, the email recipient should click the File menu, then select Open.

The email recipient should locate the BEx report on their computer, then click Open.

If the security warning, “Macros have been disabled” appears, click Enable Content.

The email recipient can now view the BEx report and make any necessary changes. Any changes made should be saved in BEx.

Course 2 - Business Objects

Business Objects Index

The lessons within the REP200U Business Objects section include:

- Lesson 1: Business Objects Overview
- Lesson 2: Logging into Business Objects
- Lesson 3: Navigating the Business Objects Interface
- Lesson 4: Running, Exporting and Saving Reports
- Lesson 5: Editing and Filtering a Query

Lesson 1 - Business Objects Overview

Lesson 1: Business Objects Overview

Lesson 1 - SCEIS Reporting

Let's begin by discussing SCEIS Reporting. Agencies use SCEIS reports to view and analyze SCEIS data to help make sound business decisions. SCEIS reports can be found in the Enterprise Core Component (ECC) portion of SCEIS, BEx and Business Objects. The Business Objects portion of this class will teach users how to access and run reports in Business Objects.

Lesson 1 - Business Objects Overview

Much of the data in SCEIS is entered or housed in Enterprise Core Component, or ECC. Many of the reports in ECC contain up-to-the-minute data, but are not easy to manipulate.

Nightly, data from SCEIS is retrieved and placed into the SCEIS Business Warehouse, which creates and updates BEx and Business Objects reports. Data in Business Objects reports, or queries, is current as of the close of business of the previous day. For example, when viewing a Business Objects report on Tuesday, the report contains data that has been entered through the close of business on Monday.

Reports in Business Objects are easier to manipulate than ECC reports and users have more filtering and formatting options in Business Objects. BEx is discussed in the BEx portion of this class.

Like BEx, Business Objects is a tool to access SCEIS data from the Business Warehouse. Everything that can be performed in BEx can be done in Business Objects; however, Business Objects offers more features and functionality than BEx.

- The formatting and chart features in Business Objects provide more professional-looking reports
- Business Objects provides the ability to schedule reports and automatically distribute them to the inboxes of multiple users located in Business Objects
- Business Objects provides the ability to combine queries, or reports to compare:
  - Fiscal years
  - Data from different queries
  - SCEIS vs. Non-SCEIS data (for example, Excel Spreadsheets)
- Business Objects provides the ability to create variables to provide more dynamic report functionality
- The maximum report size is larger in Business Objects than BEx

Lesson 2 - Logging into Business Objects

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To log into Business Objects, type the SCEIS web address, www.sceis.sc.gov in your web browser. Next, click the SCEIS Logins button located in the horizontal navigation bar.

Click the Business Objects link.

Enter your SCEIS user name and password. Choose Windows AD for Authentication. Next, click Log On.

Lesson 3 - Navigating the Business Objects Interface

Lesson 3: Navigating the Business Objects Interface

Lesson 3 - Home Screen View

After logging into Business Objects, the Home tab will appear as shown. Reports that have been viewed recently will appear in the My Recently Viewed Documents area. Most recently scheduled reports will appear in the My Recently Run Documents area. In the My Inbox area, the number of unread Business Objects items will be listed. A link to the Web Intelligence portion of Business Objects is located in the My Applications area.

SCEIS does not use the Alerts feature.

Lesson 3 - Documents View

By clicking the Documents tab, users can view the reports and folders they may access. The My Documents panel appears by default after clicking the Document tab. The My Documents panel contains a My Favorites folder and the Business Objects Inbox.

SCEIS does not use the Alerts feature, therefore the My Alerts and Subscribed Alerts folders will not be utilized.

Reports that are saved in the My Favorites folder are your personal reports, and cannot be viewed or modified by other users. The My Favorites folder is sometimes called your personal folder.

Users can send Business Objects reports to other Business Objects users through the Inbox.

The Folders panel can be opened by clicking Folders in the lower left corner of the page.

The Folders panel contains the Public Folders you have access to view. Public Folders are those created by the SCEIS Reporting Team and can be viewed by users, depending on their security access.

Users have access to run reports in Public Folders, but cannot edit them unless a copy of the report is saved in their personal, My Favorites folder, or if you are the owner of the report. This chart illustrates what users can and cannot do with reports in Public Folders.

Users can:
View reports in Public Folders
Copy reports from Public Folders and paste them in the My Favorites folder
Save reports to their agency’s shared folder

Users cannot:
Delete or cut and paste reports in Public Folders
Save reports to Public Folders other than their agency's shared folder
Create new Public Folders
Delete Public Folders or
Edit reports in Public Folders

Each agency has a shared folder in the SCSG folder. The shared folder is a folder that only users at the agency can access. All users at the agency can view the reports in this folder; however, only users with the appropriate security roles can run reports.

Enterprise reports and report templates can be found in the SCSG Enterprise folder.

Lesson 3 - Searching for a Report

To search for a report, select the folder you would like to search. Enter the search criteria in the search box and select the magnifying glass icon located in the upper right corner of the page or press Enter.

You can also search for a report by using the Search screen under the Categories tab. Here you can refine your search results by type, location and refreshed time.

Lesson 4 - Running, Exporting and Saving Reports

Lesson 4: Running, Exporting and Saving Reports

Lesson 4 - Enterprise Reports

Enterprise reports are official SCEIS created reports that can be found in the SCSG Enterprise public folder. You can easily identify enterprise reports by their title. The title of an enterprise report will begin with “Official SCEIS” as shown here.

Lesson 4 - Running an Enterprise Report

To run an enterprise report, navigate to the appropriate public folder. Right-click on the enterprise report you wish to run, and select View.

A “Prompts” window will appear. Prompts are filters that allow you to narrow the data that is shown in the report. Required prompts are marked with an asterisk. You must select a value for a required prompt.

In most reports, it is practical to select your Business Area (or agency) to only show data from your agency. Most likely, you have security rights to view data from your agency only.

To select your agency, in the Prompts window, click the Business Area From field. Type your agency’s business area code in the search box, then click the binocular icon.

Now click to select your agency’s name. Use the right arrow to make your selection.

Notice that your agency name is now shown in the Business Area From field.

Next, click the Business Area To field. Repeat the same steps to select your agency.

To apply additional filters, click the field name in the Prompts Summary area. Type the value you would like to filter by in the search box and click the binocular icon, or select Refresh Values to retrieve a list of values.

Select the value you wish to filter by, and click the right arrow to make your selection.

Notice that the filter you chose now appears to the right of the list of values. This is a good way to see the filter you have chosen.

Continue selecting values for each prompt you would like to use. Remember, required prompts are marked with an asterisk. You must select a value for a required prompt.

Note: If the key you are searching for is not found, click the drop-down menu on the binocular icon and select Search in Keys. Try searching for your key again.

Once you have selected values for the prompts you would like to use, click OK to run the report.

The report should now be populated with the data you selected in the Prompts window.

Lesson 4 - Adding a Simple Filter in View Mode

After running a report, you can use simple report filters to further narrow down your report. For example, in the report, “Summary of Expenditures by Funded Program,” you can add a simple report filter to show only the expenditures related to Unclassified Positions.

To add a simple report filter, click the Filter Bar icon.

The Add simple report filters icon will appear in the upper left corner of the report window. Click the Add simple report filters icon and choose the criteria to filter by. In this example, we chose Budget Account Commitment Items.

Notice a drop-down list appears. From the drop-down list, choose the value you would like to filter by. In this example, we chose Unclassified Positions.

The report now only shows data for Unclassified Positions.

To see all values, click the drop-down list and select (All values).

To remove the simple report filter, click the drop-down list and select (Remove).

Lesson 4 - Exporting Reports from View Mode

Reports can be exported as PDF, Excel, CSV (Comma Separated Values) or Text files. In View Mode, once the report is run, click the Export icon and select one of the options:

- Export Document As – This option will export the entire document (all tabs in the document) to the desired format.

- Export Current Report As – This option will export only the current tab of the document.
- Export Data to CSV – This options allows you to save the report as a CSV file.

In this example, we have chosen the Export Document As option. Next, choose the desired file format.

We have chosen to export the report to Excel. Your computer may ask if you would like to Open the file now or Save it. We chose to Open the file.

This example shows the report in Excel. You can modify the report in Excel and Save any changes to your computer.

Lesson 4 - Saving a Report to My Favorites or Shared Folder

You can save a report to your Favorites Folder or your agency's shared folder. You will need to do this before you can modify a public report.

Begin by clicking the drop-down arrow next to the Save icon and select Save As.

Select the folder you would like to save the report to, either in the Favorites Folder or your agency's shared folder, located in the SCSG folder.

In this example, we are saving the report to the Favorites Folder. Type the report name in the File Name text box.

If you select the double arrows under the file type, you can add a Description for the report. Select the "Refresh on open" option in the lower left corner of the Save As window to automatically refresh the report when opened. Otherwise, you will need to click the Refresh icon to refresh the report.

Click the Save button when you are ready to save.

Lesson 4 - Scheduling a Report

You can schedule any report you can access to automatically run (or retrieve the most recent data available) periodically. This is called scheduling a report. Each time the report is run, an instance of the report is created and stored in the History of the report.

To begin, click the Documents tab and navigate to the report you wish to schedule. Click the report title to select it.

Click the More Actions icon, then select Schedule.

If you would like to change the title of the report, type it in the Instance Title box.

Click Recurrence on the left menu. Click the drop-down list beside Run object and select how often you would like the report to run. In this example, we have chosen Monthly.

Enter the Start and End Dates and Times. In this example, the report will run monthly beginning July 1, 2015 through June 30, 2016.

After completing the Recurrence information, click Schedule in the lower right corner of the window.

Lesson 4 - Accessing Report History

Each time a report is scheduled to run an instance of the report is created. To access these instances, right-click on the report title and select History.

A list of the report instances appears with the Title of the report instance and the Instance Time (the time the report was run). To open an instance, click the Instance Time hyperlink.

Lesson 4 - Rescheduling/Changing Report Schedules

To change the report schedule, find the report instance with the status of Recurring. If there are many instances, it's best to filter the Status column to show Recurring only. To do this, click the yellow filter icon in the Status column.

Click the Recurring radio button and select OK.

Click the Recurring instance. Under the More Actions drop-down menu, select Reschedule.

Make any necessary changes to the Instance Title. Click the Replace option in the left navigation. Choose whether to Replace the existing schedule, or Create a new schedule from the existing schedule.

It is suggested to choose Replace existing schedule if you are adding or deleting individuals to send the report to.

After making the necessary changes, click the Schedule button in the lower right corner of the window.

Lesson 5 - Editing and Filtering a Query

Lesson 5: Editing and Filtering a Query

Lesson 5 - View Mode vs. Edit Mode

Double-clicking a report title in the Documents tab opens it in View Mode.

In View Mode, you can refresh the report, export the report, save the report to your Favorites or a shared folder and apply simple filters.

Edit Mode is used when making modifications to the report.

Lesson 5 - Modify a Report

To modify, or edit a report, right-click the report you wish to edit. Select Modify.

You are now in Edit Mode. The Prompts window will open if the report has prompts. Select values for any required prompts and any additional prompts you would like to use. Click OK. Answering prompts was discussed in Lesson 4 of this class.

You can now make changes to the report such as adding additional data fields to the query, and adding query and report filters.

Lesson 5 - Editing a Query

To add additional data fields to the report, you must edit the report's query. You must be in Edit Mode to edit the query. Begin by clicking the Data Access tab, then click Edit.

The Query Panel appears. Let’s take a moment and review the four areas of the Query Panel:

The Universe Outline area – Lists possible objects, or data fields, available to use in the report
The Result Objects area – Shows the objects that will be included in the report
The Query Filters area – Shows the objects the report will be filtered by at the query level
The Data Preview area – Allows you to click the Refresh button to see a preview of the report.

To add an additional data field to the report, find the data field in the Universe outline then drag and drop the data field title into the Result Objects area.
You can also double-click the data field, and it will automatically place it in the Result Objects area. In this example, we added the data field Budget Adjustments to the Result Objects area.

To see a preview of the report, click the Refresh button.

Click Run Query when you are ready to run the report.

If the Prompts window appears, select a value for each required prompt and any additional prompt filters you would like to add. Click OK.

Note: Your previous prompt replies will be saved in the Prompts Summary. If no changes are needed, just click OK to run the report.

Notice that the Budget Adjustments data field is now in the list of Available Objects. To add the field to the report, you must drag and drop the data field from the Available Objects area to a place in the report.

In this example, we would like the Budget Adjustments column to be the column after Current Budget. Release the data field once you see the thin blue bar in the place you would like the column to appear.

Budget Adjustments is now added to the report. The data automatically populates in the column.

Lesson 5 - Query Filters

There are several types of filters you can apply to your report. We have already discussed prompt filters, those filters that appear each time a report is run or refreshed. Another type of filter is a query filter. A query filter limits the results in a report or document before the query is run. Query filters are applied in the Query Panel.

To access the Query Panel, first click the Data Access tab, and then click Edit.

Find the data field you would like to filter by in the Universe outline, then drag and drop it in the Query Filters area.

You will first choose the operand needed. The default operand is In list. For an explanation of each operand, please print the Operand Definitions document.

Type the value of your filter in the blank text box, or click the drop-down arrow and select Value(s) from the list. Selecting Value(s) from the list allows you to select a value from a list of possible values.

Under the same drop-down menu, you can also make this filter a prompt. Remember, prompts will ask you to select a value each time the report is run.

In this example, we have selected Value(s) from the list. Once the list of values appears, click the value you wish to filter by and click the right arrow to move the value into the Selected Value(s) box.

Depending on the operand you selected, you may select multiple values to filter by.

In this example, we would only like to see the Budget Account Commitment Item, Classified Positions. Click OK once you are finished selecting values to filter by.

Once you have added all filters needed, click Run Query.

If the Prompts window appears, select a value for each required prompt and any additional prompt filters you would like to add. Click OK.

Note: Your previous prompt replies will be saved in the Prompts Summary. If no changes are needed, just click OK to run the report.

Notice that the Budget Account Commitment Items Information only contains Classified Positions.

To delete a query filter, click the Data Access tab. Then, click Edit.

Click the filter you wish to delete, then press Delete on your keyboard. In this example, we are deleting the filter on Budget Account Commitment Items.

Click Run Query.

Notice that the Budget Account Commitment Items Information column now contains all values.

Lesson 5 - Report Filters

Another type of filter is the report filter. Report filters are applied on the report level, after the query is run. To apply a report filter, click the Analysis tab.

Select the drop-down menu beside the Filter icon and select Add Filter.

Choose the section of the document to apply the filter.

In this example, selecting Four Twenty-Four - By Funded Program will apply the filter to the entire report tab. Selecting Horizontal Table: Header Table will apply the filter to the table or block only. Selecting the Section: Business Area Key will apply the filter only on the Business Area Key section breaks of the report.

Now, click Add filter.

Choose the data field you would like to filter and click OK.

Choose the operand from the drop-down list in the filter.

Select the value you wish to filter by and click the arrow pointing to the right to add the value to the Selected Value(s) box. In this example, we would like to see only Federal Funds.

Click OK.

Notice that after applying the filter, only Federal Funds appear in the report.

To edit or remove a filter, click the drop-down menu beside the Filter icon and select Edit Filter or Remove Filter.

Lesson 5 - Sections

You can divide or group a report by data field values by creating a section.

In Edit Mode, begin by right-clicking on the column you wish to group the table by. In this example, we would like to group the report by Fund. Now, choose Set as Section.

Notice that the Fund column is removed from the table. The Fund values now appear as headers or sections above the table. The table under the General Fund section contains data related to the General Fund only.

To remove a section, right-click on the section or header cell, select Delete, then select Cell And Section.

Notice the section cells are deleted from the report. To add the data field back to the table, click to highlight the field in the Available Objects area…

…then drag and drop it in the report where you would like it to appear. Notice the blue bar shows where the data field will appear.

Lesson 5 - Breaks

Similar to sections, breaks also divide or group report data. Breaks divide the report into smaller tables of like information.

To add a break, right-click the column you wish to divide the table by, select Break, then select Add Break.

In this example, we added a break on Fund. Notice that the table is now grouped by Fund.

You can add multiple breaks to a table to further group like information. Right-click on the column, select Break, then select Add Break.

In this example, we have a break on Fund and Funded Program – Budget.

To remove a break, right-click on the column that contains the break, select Break, then select Remove Break. Selecting Remove All Breaks will remove all breaks in the table.

Lesson 5 - Class Summary

You should now be able to:

- Describe SCEIS reporting and access the tools that house reports
- In BEx:
    - Open, run and refresh queries
    - Select prompt values
    - Add, move and remove columns
    - Suppress and display repeated values and results rows
    - Add filters
    - Save and send workbooks
- In Business Objects:
    - Run, export and save reports
    - Schedule reports
    - Edit a query
    - Add query and report filters
    - Add sections and breaks